

Batch Import/Export

The Batch Import/Export tool is still under development.

Many of the features of the tool are not currently functional.

Please keep this in mind and be patient as you use the tool. Hopefully the tool will be fully functional for Version 2.0.

Batch Import/Export

What you can do with the Batch Import/Export tool as of today:

- Import batches of Bibliographic records to the system
- Import batches of new Bibliographic records with holdings data attached
- Export batches of copies of Bibliographic records from the system

Batch Import/Export

What you can't do as of today:

- Import Authority Records
- Overlay existing records
- Edit the records in the Importer before they are uploaded
- Batch import holdings data for records already existing in Evergreen Indiana



Record Sources

Places where you can get records for Batch Import:

- Subscription services such as OCLC or vendors
- The Library of Congress
<http://catalog.loc.gov/webvoy.htm>
- Other libraries with access on their websites

Record Sources

- Albuquerque-Bernalillo County Library System (NM) <http://albuq.cabq.gov/screens/librarybanner.jpg>
- Canton Public Library (MI) <http://catalog.cantonpl.org/>
- Carrollton Public Library (TX) <http://innovative.cityofcarrollton.com/>
- Central Arkansas Library System (AR) <http://vera.cals.lib.ar.us/>
- Cuyhoga County Public Library (OH) <http://sciron.cuyahoga.lib.oh.us/>
- Greenwich Library (CT) <http://pac.greenwichlibrary.org/>
- Helin Library (RI) <http://library.uri.edu/>
- Kentucky Department of Libraries and Archives (KY) <http://kdla.kyvl.org/vwebv/searchBasic>
- La Porte County Library (IN) <http://catalog.lapcat.org/>
- Lakeland Library Cooperative (Western MI) <http://lakenet.llcoop.org/search%7ES1>
- LAMA Libraries (CO) <http://pineriverpubliclibrary.org/>
- Luzerne County Library System (PA) <http://209.50.143.33/>
- Marmot Library Network (CO) <http://www.millennium.marmot.org/>
- Marquette University (MI) <http://libus.csd.mu.edu/>
- Merlin Library Catalog (Northern WI) <http://merlin.nwls.lib.wi.us/>
- Middle Country Public Library (Long Island, NY) <http://www.mcpl.lib.ny.us/search.html>
- Multnomah County Library (OR) <http://catalog.multcolib.org/search>
- Newport Beach Public Library (CA) <http://millennium.newport.lib.ca.us/>
- Norwalk Public Library System (CT) <http://catalog.norwalklib.org/>
- Norwin Public Library (PA) <http://www.norwinpubliclibrary.org/>
- Oakland Public Library (CA) <http://catalog.oaklandlibrary.org/>
- OPAL Catalog (OH) <http://cat.opal-libraries.org/search/X>



Record Sources

- Pima County Public Library (Tucson, AZ) <https://librarycatalog.pima.gov/search>
- Portsmouth Libraries (NH) <http://12.30.15.69/>
- Prospector (CO) <http://prospector.coalliance.org/>
- Riverside Public Library (CA) <http://read.riversideca.gov/>
- SageCat (Eastern OR) <http://eos.eou.edu/>
- San Francisco Public Library (CA) <http://sflib1.sfpl.org/>
- Scottsdale Public Library (AZ) <http://libcat.scottsdaleaz.gov/>
- St. John the Baptist Parish Public Library (LA) <http://opac.stjohn.lib.la.us/>
- St. Joseph County, Mishawaka-Penn-Harris, Plymouth, and Bremen Public Libraries (IN) <http://stjos.sjcpl.lib.in.us/>
- Sunnyvale Public Library (CA) <http://sunset.ci.sunnyvale.ca.us/>
- SWAN Libraries (IL) <http://swan.mls.lib.il.us/>
- Thousand Oaks Public Library (CA) <http://search.tolibrary.org/>
- Thurgood Marshall Law Library (Texas Southern University) <http://library.tsulaw.edu/>
- Virginia Theological Seminary (VA) <http://librarycatalog.vts.edu/>
- Watauga Regional Public Libraries (TN) <http://libraries.etsu.edu/>
- WebPac Prolibraries.url
<http://wiki.library.oregonstate.edu/confluence/display/WebOPAC/Libraries+that+have+installed+WebPac+Pro>
- York County Library System (PA) <http://millennium.yorklibraries.org/>

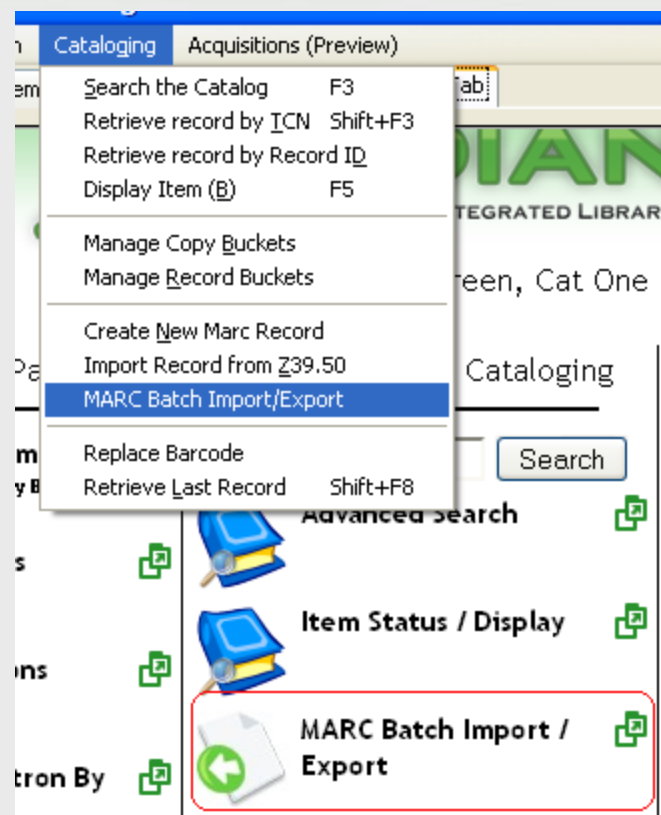


Record Sources

- Note that at a previous roundtable we suggested MelCat at <http://elibrary.mel.org/search> as a good source of records.
- It has a wealth of records that are free to download, but unfortunately if you import them directly from the MelCat site, they import into Evergreen with an extra blank 008 field.
- This leads to nonsensical fixed fields which cannot be edited.
- The problem has been reported, and we are hoping this will be resolved so that the records can be used in the future.
- At this time we recommend that this site not be used, because the fixed fields cause display and searching issues.
- However, MelCat records can be downloaded successfully using a subscription services called BookWhere.

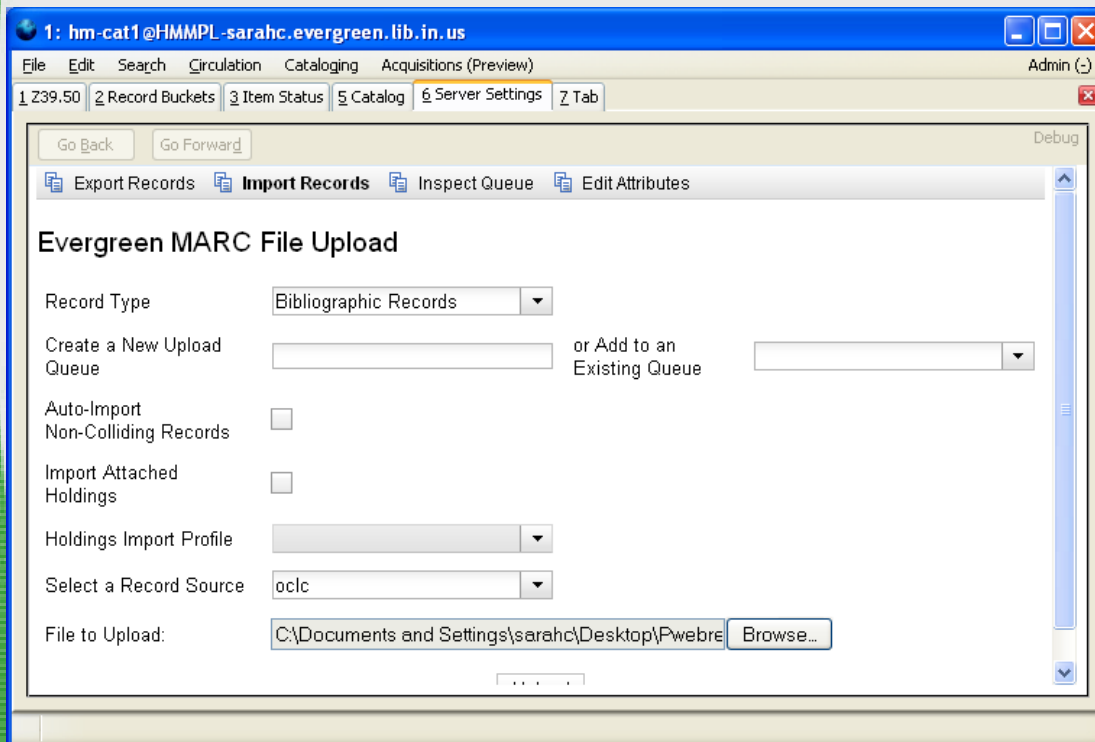
Accessing the Import Tool

You can access the Batch Import/Export tool from an icon on the splash screen, or from the Cataloging menu.



Import Records

There are four 'tabs' in the Importer/Exporter.
The active tab when you open it is Import.



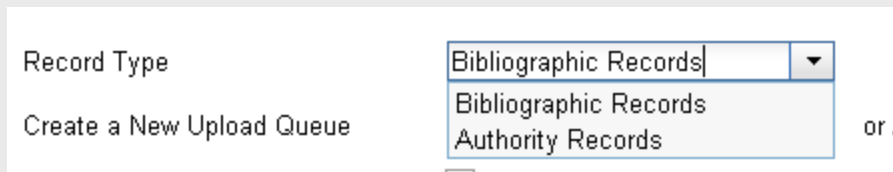
The screenshot shows a web browser window with the address bar displaying '1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us'. The browser has a menu bar with 'File', 'Edit', 'Search', 'Circulation', 'Cataloging', and 'Acquisitions (Preview)'. Below the menu bar is a tab bar with seven tabs: '1 Z39.50', '2 Record Buckets', '3 Item Status', '5 Catalog', '6 Server Settings' (which is the active tab), and '7 Tab'. The main content area is titled 'Evergreen MARC File Upload' and contains several form fields and buttons. At the top of the form area are 'Go Back' and 'Go Forward' buttons. Below them is a horizontal bar with four icons and labels: 'Export Records', 'Import Records' (which is highlighted), 'Inspect Queue', and 'Edit Attributes'. The form fields include: 'Record Type' with a dropdown menu set to 'Bibliographic Records'; 'Create a New Upload Queue' with a text input field, followed by 'or Add to an Existing Queue' with a dropdown menu; 'Auto-Import Non-Colliding Records' with an unchecked checkbox; 'Import Attached Holdings' with an unchecked checkbox; 'Holdings Import Profile' with a dropdown menu; 'Select a Record Source' with a dropdown menu set to 'oclc'; and 'File to Upload:' with a text input field containing 'C:\Documents and Settings\sarahc\Desktop\Pwebre' and a 'Browse...' button. A 'Debug' button is located in the top right corner of the form area.

Import Records

- To Batch Import records, you must have the records saved to your computer in MARC format.
- When you have an option as to how to save the records, choose MARC Unicode.

Import Records

- The Batch Importer/Exporter gives the option to import either bibliographic or authority records. At this time, only the bibliographic option works.



The screenshot shows a web interface for importing records. It features a label 'Record Type' next to a dropdown menu. The dropdown menu is open, showing two options: 'Bibliographic Records' and 'Authority Records'. Below the dropdown, there is a checkbox labeled 'Create a New Upload Queue' and the text 'or A'.

Record Type	Bibliographic Records	▼
Create a New Upload Queue	Bibliographic Records	or A
	Authority Records	

Import Records

To create a new Upload Queue just type the name of the queue in the empty box before you import a batch.

Create a New Upload Queue	<input type="text" value="Juvenile records"/>	or Add to an Existing Queue	<input type="text" value=""/>
Auto-Import Non-Colliding Records	<input type="checkbox"/>		
Import Attached Holdings	<input type="checkbox"/>		
Holdings Import Profile	<input type="text"/>		<div>export test Holdings test Juvenile DVDs OCLC records</div>

To add to an existing queue instead, select that queue from the drop-down list.

Import Records

You can automatically import all records that do not have possible matches in the system by placing a checkmark in the box.

Auto-Import Non-Colliding Records	<input checked="" type="checkbox"/>
Import Attached Holdings	<input type="checkbox"/>

If you do not choose auto-import, the records will be uploaded to your Record Queue and you will have a chance to review them before you import them.

Import Records

- If you have holdings information included in the 949 field of your MARC record, you can import records with holdings attached.
- For information on how to set up the 949 fields, see Chapter 24 of the Training Manual.
- You must currently use the Auto Import function.
- Select the Holdings Import Profile seen below:

Auto-Import Non-Colliding Records	<input checked="" type="checkbox"/>
Import Attached Holdings	<input checked="" type="checkbox"/>
Holdings Import Profile	<div>OCLC Connexion Format ▼</div> <div>Evergreen 852 export format</div> <div>Unicorn Import format -- 999</div> <div>OCLC Connexion Format (Indiana Custom) -- 949</div>
Select a Record Source	
File to Upload:	<div>Browse..</div>



Import Records

- For any records where you will be adding your holdings with an item record, use the “Invisible w/o holdings” options. If your record source is OCLC, select that option, and if you use another record source, choose “System Local.”
- Use the “Trancend w/o holdings” options for records for electronic items that will have no holdings attached, and will be accessed via the internet. If your record provider is listed, choose that option, otherwise use “Generic –Trancend w/o holdings”

Select a Record Source

File to Upload:

OCLC - Invisible w/o holdii

OCLC - Invisible w/o holdings

System Local - Invisible w/o holdings

Project Gutenberg

YBP NetLibrary

Generic - Trancend w/o holdings

Gale - Trancend w/o holdings

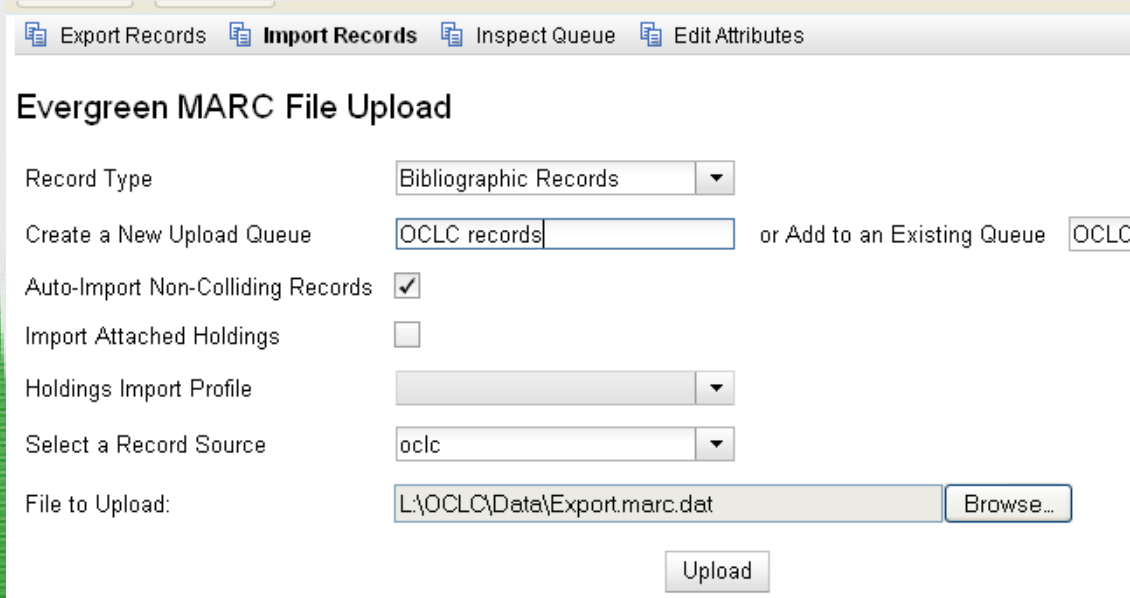
Overdrive - Trancend w/o holdings

MARCIVE, Inc. - Trancend w/o holdings

Browse...

Import Records

When you've selected all the options you need, click browse to find the file on your computer that you wish to upload. Then click Upload.



The screenshot shows the 'Evergreen MARC File Upload' window. At the top, there are four tabs: 'Export Records', 'Import Records' (which is selected), 'Inspect Queue', and 'Edit Attributes'. Below the tabs, the title 'Evergreen MARC File Upload' is displayed. The form contains several fields and checkboxes: 'Record Type' is a dropdown menu set to 'Bibliographic Records'; 'Create a New Upload Queue' is a text input field containing 'OCLC records', followed by 'or Add to an Existing Queue' and another text input field containing 'OCLC'; 'Auto-Import Non-Colliding Records' is a checked checkbox; 'Import Attached Holdings' is an unchecked checkbox; 'Holdings Import Profile' is a dropdown menu; 'Select a Record Source' is a dropdown menu set to 'oclc'; 'File to Upload:' is a text input field containing 'L:\OCLC\Data\Export.marc.dat', followed by a 'Browse...' button; and an 'Upload' button at the bottom center.

Export Records Import Records Inspect Queue Edit Attributes

Evergreen MARC File Upload

Record Type Bibliographic Records

Create a New Upload Queue OCLC records or Add to an Existing Queue OCLC

Auto-Import Non-Colliding Records ☒

Import Attached Holdings ☐

Holdings Import Profile

Select a Record Source oclc

File to Upload: L:\OCLC\Data\Export.marc.dat Browse...

Upload

Inspect Queue

The file will open in the Inspect Queue tab.

- The Upload Queue works as a record import manager. It allows you to store batches of records which you are uploading to different queues. You can then use the Inspect Queue tab to review the records.
- You can create a new queue for each batch of items or add the batch to a queue you already have. You cannot delete items from an existing queue, so you may find it more manageable to create a new queue. Old queues can be deleted.
- If you didn't enter a name in the upload queue, a queue will still be created. It will be a nameless queue and show up as a blank line on the drop down list.

Inspect Queue

If you have not chosen auto-import, all of your records will be loaded to the upload queue:

1: hm-cat1@HMPL_sarahc.evergreen.lib.in.us

File Edit Search Circulation Cataloging Acquisitions (Preview) Admin (C)

1,239.50 2 Record Buckets 4 Server Settings

Go Back Go Forward Debug

Export Records Import Records Inspect Queue Edit Attributes

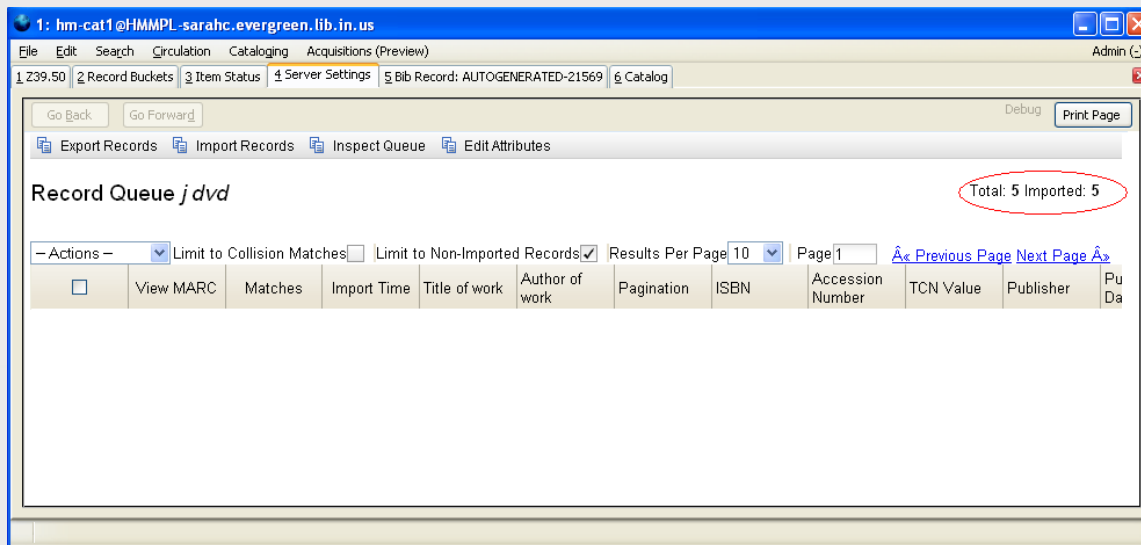
Record Queue *Juvenile DVDs* Total: 11 Imported: 0

Actions Limit to Collision Matches Limit to Non-Imported Records Results Per Page Page

<input type="checkbox"/> View MARC	Matches	Title of work	Author of work	Pagination	ISBN	Accession Number	TCN Value	Publisher	Publication Date	Edition
<input type="checkbox"/> View MARC		The Christmas witch produced by Think Entertainment in association with Universal Cartoon Studios ; animation producer, Arthur Leonardi ; animation director, Graham Morris ; live action produced and directed by Courtney B. Conte ; executive producer Shelley Duvall ; story & pictures by Steven Kellogg.		1 videodisc (27 min.) :		ocn459790471		NBC Universal, Inc. ;	2009	
<input type="checkbox"/> View MARC		Christmas around the world Schlessinger Media ; Nancy Glass Productions ; director, Philip Tangel ; writer, Kate Youngdahl ; producer, Bette Hanson.		1 videodisc (23 min.) :	1417100249	ocn57180003		Schlessinger Media,	2004	
<input type="checkbox"/> View MARC		Christmas Schlessinger Media ; produced by Rhonda Fabian and Jerry Baber ; directed by Rhonda Fabian.		1 videodisc (25 min.) :	1417100230	ocn57351878		Schlessinger Media,	2004	
<input type="checkbox"/> View MARC		Hanukkah/Passover Schlessinger Video Productions ; [produced and directed by Fabian-Baber Communication]		1 videodisc (ca. 23 min.) :	1417100303	ocn57301300		Schlessinger Video Productions,	19942004	
<input type="checkbox"/> View MARC		Hanukkah/Passover Schlessinger Video Productions ; [produced and directed by Fabian-Baber Communication]		1 videodisc (ca. 23 min.) :	1417100303	ocn57301300		Schlessinger Video Productions,	19942004	
<input type="checkbox"/> View MARC		Kwanzaa Schlessinger Media ; produced by Rhonda Fabian and Jerry Baber ; directed by Rhonda Fabian.		1 videodisc (25 min.) :	141710032X	ocn57351928		Schlessinger Media,	2004	
<input type="checkbox"/> View MARC		Toy train Christmas memories a McComas/Stachler production.		1 videodisc (3 hrs., 20 min.) :	1932291075	ocn54482188		TM Books and Video,	2003	
<input type="checkbox"/> View MARC		Potty whispering the gentle art of infant potty training / White-Boucke Publishing Media Productions ; produced & directed by Colin White.		2 videodiscs (140 min.) :	9781888580334	ocn123799142		White-Boucke Pub.,	2006	
<input type="checkbox"/> View MARC		I love Christmas a Tom McComas production.		1 videodisc (42 min.) :	1932291865	ocn184907773		TM Books & Video Inc.,	2008	[Rev. 2nd ed.]
<input type="checkbox"/> View MARC		Why we love cats and dogs PBS and Thirteen WNET New York.		1 videodisc :	9781594644665	ocn463651759		Educational Broadcasting Corporation ;	2009	
<input type="checkbox"/> View MARC		Shelley Duvall's tall tales & legends. The complete series produced by Fredric S. Fuchs, Bridget Terry ; directed by Howard Storm ; written by Gary Jacobs.		3 videodiscs (458min.) :	1417232420	ocn457072632		E1 Entertainment	2009	

Inspect Queue

If you have chosen auto-import, your records will be loaded directly into the catalog, and if you don't have colliding records your import queue will appear empty:



Inspect Queue

- You can still view imported records in the Import Queue by unchecking the limit to Non-Imported Records box:

Export Records Import Records **Inspect Queue** Edit Attributes

Record Queue *j dvd* Total: 5 Imported: 5

Limit to Collision Matches ☐ **Limit to Non-Imported Records** ☐ Results Per Page 10 Page 1 [Previous Page](#) [Next Page](#)

<input type="checkbox"/> View MARC	Matches	Import Time	Title of work	Pagination	Accession Number	Publisher	Public Date
<input type="checkbox"/> View MARC	Matches	3/9/10	Chickens aren't the only ones produced by Lancit Media Productions, Ltd., a production of GPN/Nebraska ETV Network and WNED-TV Buffalo ; produced by Cecily Truett, Larry Lancit ; written by Mark Eisman ; executive producers, Twila C. Liggett, Tony Buttino ; directed by Mitchell Geller.	1 videodisc (30 min.) :	ocn505269589	Distributed by GPN Educational Media,	2008
<input type="checkbox"/> View MARC	Matches	3/9/10	Giving thanks a Native American good morning message / produced by Lancit Media Productions, Ltd., a production of GPN/Nebraska ETV Network and WNED-TV Buffalo ; produced by Kathy Kinsner ; written by Ronnie Krauss and Ellen Doherty ; executive producers, Twila C. Liggett, Tony Buttino, LeVar Burton ; directed by Kevin Lombard, Mark Mannucci and Larry Lancit.	1 videodisc (30 min.) :	ocn505274801	Distributed by GPN Educational Media,	2008
<input type="checkbox"/> View MARC	Matches	3/9/10	Raccoons and ripe corn produced by Ronnie Krauss ; directed by Larry Lancit ; written by Andrew Gutelle ; produced by Lancit Media Productions, Ltd. ; a production of WNED-TV & GPN.	1 videodisc (30 min.) :	ocn505284004	distributed by GPN Educational Media,	2008
<input type="checkbox"/> View MARC	Matches	3/9/10	The paper crane produced by Cecily Truett, Larry Lancit ; directed by Mitchell Geller ; written by Ellen Schecter ; produced by Lancit Media Productions, Ltd. ; a production of Great Plains National Television Library and WNED-TV.	1 videodisc (ca. 30 min.) :	ocn505284974	Distributed by GPN Educational Media,	2008
<input type="checkbox"/> View MARC	Matches	3/9/10	Germs make me sick produced by Lancit Media Productions, Ltd., a production of GPN/Nebraska ETV Network and WNED-TV Buffalo ; produced by Cecily Truett, Larry Lancit ; written by Ronnie Krauss ; executive producers, Twila C. Liggett, Tony Buttino ; directed by Hugh Martin.	1 videodisc (30 min.) :	ocn505285028	Distributed by GPN Educational Media,	2008

Inspect Queue

The Upload Queue is configurable:

- You can choose which columns are displayed in the records summaries with a column picker, and save your changes.
- You can change the widths of the columns, but you currently cannot save these changes.
- You can click on view MARC to view the full MARC record.
- You can change how many records you view, and limit to Non-imported or Matching records.

Matching Records

Matches

- If there is a link in the Matches column, the system has found a match and the record has not been auto-imported.
- The batch importer checks for matches based on ISBN as well as TCN, so it may find a 'match' that you have determined is not the correct record.
- It does not check for matches based on UPC and an equivalent ISBN 10 and ISBN 13 won't be matched, so it is still very easy to import duplicate records via batch.
- You should always check the system for the records before you batch import, just as you would before importing via Z39.50.

Matching Records

Matches

- You can click on the link to see a summary of information about the matching record.
- You will need to look up the item in the catalog to view the MARC record to determine if it is truly a match.

↩ Back To Import Queue										
Overlay Target	Source Match Point	Destination Match Point	ID	View MARC	Creator	Create Date	Last Edit Date	Source	TCN Source	TCN Value
<input type="checkbox"/>	rec_identifier	tcn_value	14351611	14351611	hm-cat1	12/2/09	12/2/09		OCoLC	ocn458616306
<input type="checkbox"/>	eg_tcn	tcn_value	14351611	14351611	hm-cat1	12/2/09	12/2/09		OCoLC	ocn458616306
<input type="checkbox"/>	eg_identifier	id	14351611	14351611	hm-cat1	12/2/09	12/2/09		OCoLC	ocn458616306

- Use the Back to Import Queue button to return to your list of records.

Adding Holdings

If you've used Auto Import, and checked your Import Queue to see if you had any record matches, you can search for the records in the catalog to add your holdings.

Tip: To find them more easily, you can limit your search to your local library. It will include new records without holdings.

Importing from Upload Queue

If you have not used auto-import, you will need to import your records from the Upload Queue.

You can either select Import All from the Actions list or click the check boxes and use Import Selected.

Record Queue *export test*

- Actions -		Limit to Collision Matches <input type="checkbox"/>		Limit to Non-Imported <input type="checkbox"/>	
- Actions -		MARC	Matches	Import Time	Title of work
Import Selected					
Import All					
Delete Queue					
<input type="checkbox"/>	View MARC	Matches			Holiday kitchen a cornucopia of delicious video recipes for your holiday table!
<input type="checkbox"/>	View MARC	Matches			The Patty Duke show. Season one Metro-Goldwyn-Mayer.

Deleting Queues

From the Actions List you can also select Delete Queue.

This will not delete the records from the catalog if you've already imported them.

The Queue is somewhat like a bucket in that it just collects the records in one spot for viewing and managing.

Note: You can delete the whole queue, but you can't remove items from the queue.

Export Records

The tab on the far left is the Export Records tab.

The screenshot shows a web browser window with the address bar displaying `1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us`. The browser has a menu bar with `File`, `Edit`, `Search`, `Circulation`, `Cataloging`, and `Acquisitions (Preview)`. Below the menu bar is a tab bar with four tabs: `1 Z39.50`, `2 Record Buckets`, `3 Bib Record: 13903061`, and `4 Server Settings`. The `Record Buckets` tab is active. The main content area has a sub-header `Export Records` and a navigation bar with `Export Records`, `Import Records`, `Inspect Queue`, and `Edit Attributes`. The `Export Records` tab is selected. The form contains the following fields and controls:

- `Use Field Number`: A text input field with the value `0` and the text `(starting from 0)` to its right.
- `From CSV File`: A text input field with a `Browse...` button to its right.
- `Or`: A text label.
- `Record ID`: A text input field.
- `Or`: A text label.
- `Record Bucket ID`: A text input field.
- `Record Type`: A dropdown menu with `Bibliographic Records` selected.
- `Record Format`: A dropdown menu with `MARC21` selected.
- `Record Encoding`: A dropdown menu with `UTF-8` selected.
- `Include holdings in Bibliographic Records`: A checkbox that is currently unchecked.
- `Retrieve Records`: A button.

Export Records

The Record Export tab allows you to Export batches of MARC records or single records, for instance you can export a bucket by bucket number. When exported, the records will be saved to a file on your desktop.

This will be useful in the future for doing batch edits of MARC records, but since you cannot currently overlay the records upon import, this would be not much quicker than individually editing the records.

Information on Exporting records will be forthcoming, and we'll be happy to answer questions about it if you have a use for it.

Edit Attributes Screen

- The final tab, Edit Attributes, allows you to do batch edits to the MARC records as they are imported.
- This feature is for use with the acquisitions module which is coming .